

TS-EAS EAC team Chicago meeting

Relations, referencing and citations

28 July 2020

Topics at the Berlin meeting (1/3)

- Referencing and linking attributes
 - `@(xml:)id` and `@target`
 - *@parent as a specific “target” attribute (only in EAD3)*
 - `@(xlink:)href` and related attributes
 - *@identifier (only in EAD3)*
 - *@sourceReference and related attributes (from “Assertion description”)*

Topics at the Berlin meeting (2/3)

- Relations

- Name of the related entity, e.g. in <nameEntry><part> or <term>
- @vocabularySource (literal), @vocabularySourceURI, @valueURI

Topics at the Berlin meeting (3/3)

- Assertion description
 - Child element <citedRange> with the existing element <source> (in <control>)
 - @sourceReference, @maintenanceEventReference, @conventionDeclarationReference

EAD3 reconciliation (1/2)

- Attributes

- @id and @target
 - @containerid and @parent as a specific case
- @href and related attributes
 - @entityref and @xpointer as specific cases
- @identifier, @normal, @relator, @rules, @source

EAD3 reconciliation (2/2)

- Elements

- <ref> (main referencing element for internal and external references)
 - <archref> and <bibref>
 - <ptr> and <ptrgrp>
- <citation> (only in <control>)
 - along with <abbr>

Decisions taken so far and final questions

Internal linking attributes (1/2)

- Decided:
 - Remove XML namespace, i.e. @xml:id becomes @id
 - Make sure @id is available with all elements of EAC-CPF, so that they can be pointed to
- To confirm:
 - Add @target to EAC-CPF, so that one can point from there to another element
- Pending:
 - Add @target to **all elements** of EAC-CPF?

Internal linking attributes (2/2)

- Decided:
 - Add @sourceReference, @maintenanceEventReference, and @conventionDeclarationReference
- Pending:
 - Add to **all elements** of EAC-CPF?
 - Add to **elements** of EAC-CPF **that can contain text themselves?**
 - Add to **elements** of EAC-CPF **that are not empty?**
 - (same as with language attribution)

External linking attributes (1/2)

- Decided:
 - Remove XLink namespace, i.e. @xlink:href becomes @href etc.
 - Only use @href, @linkRole, and @linkTitle
 - Add @vocabularySource, @vocabularySourceURI, and @valueURI

External linking attributes (2/2)

- Pending:
 - Add @vocabularySource, @vocabularySourceURI, and @valueURI to **all elements that encode data which can be represented by URI-s**
 - <nameEntry>, <part>, <placeEntry>, <placeRole>, <relationType>, <targetEntity>, <targetRole>, <term>
 - Any others?

Pending questions regarding attributes

EAD3 reconciliation (1/2)

- In EAD
 - @identifier would become @valueURI
 - @source would become @vocabularySource
 - @vocabularySourceURI would be added
- Pending question with potential effect on EAC
 - Should there be a @rules attribute if it's about linking to external rules and conventions?
 - Or is this covered by providing a link to the vocabulary, which might specify the applied rules anyway?

EAD3 reconciliation (2/2)

- Pending question with potential effect on EAC
 - Should there be a @relator attribute to specify the contextual role or relationship of the target entity with the described entity when not in <relations>, e.g. when used with <term>?
 - Should there be a @normal attribute to provide a standardised spelling of the term?
 - Or is this covered by providing a link to the vocabulary, which might specify the standardised name anyway?

Pending questions regarding elements

Scope of <citation> and <ref>

- EAC-CPF uses <citation>:
 - To cite an(y) external resource
 - As mandatory and not repeatable within <control> and as optional and repeatable within <description>
- EAD3 uses:
 - <citation> to identify any rules and conventions, only within <control>, as mandatory and not repeatable
 - <ref> to cite external (as well as internal) resources, throughout the whole XML instance, as optional and repeatable

Contexts for <citation> and <ref>

- EAC-CPF uses <citation> in:
 - <biogHist>, <conventionDeclaration>, <function>, <legalStatus>, <localDescription>, <localTypeDeclaration>, <mandate>, <occupation>, <place>, <rightsDeclaration>
- EAD uses <citation> in:
 - <conventiondeclaration>, <localtypeddeclaration>, <rightsdeclaration>
- EAD3 used <ref>...
 - ...basically everywhere (see tag library for details <https://www.loc.gov/ead/EAD3taglib/EAD3.html#elem-ref>)

Options (1/4)

- Option 1: Use **two elements** for (external) resources depending on the contexts wherein they are used
 - I.e. add <ref> (or rather <reference>) within <description> instead of <citation>
- Option 2: Use **only one element** independent from its context
 - I.e. decide for either <citation> or <ref> (<reference>)

Options (2/4)

- Option 3: Remodel “citation” in EAC-CPF based on the approaches discussed on the previous slides
 - Could apply to <conventionDeclaration>, <function>, <legalStatus>, <localDescription>, <localTypeDeclaration>, <mandate>, <occupation>, <place>, <rightsDeclaration>
 - Might be more tricky for <biogHist>
 - Though that is a topic of its own

Options (3/4)

- Option 3 (continued):
 - Use @valueURI, @vocabularySource, and @vocabularySourceURI to point to an external vocabulary, ontology, thesaurus etc.
 - Use @href, @linkRole, and @linkTitle to point to any other external resource
 - Use @conventionDeclarationReference to point to a rule or convention specified within the EAC-CPF instance

Options (4/4)

- Option 3 (continued):
 - Add <term> (or maybe rather consider to introduce <title>) within <conventionDeclaration>, <localTypeDeclaration>, and <rightsDeclaration> to provide the name of the rule or convention

Encoding examples for option 3 (1/2)

Current:

```
<conventionDeclaration>
  <citation>"ISO 8601 - Data elements and
  interchange formats - Information interchange -
  Representation of dates and times." Geneva:
  International Standards Organization,
  2000.</citation>
</conventionDeclaration>
```

```
<localTypeDeclaration>
  <abbreviation>Categorycodes</abbreviation>
  <citation xlink:href="http://nad.ra.se/static/
  termlistor/Kategorikoder.htm">
  The categorycodes used in Swedish NAD
  (http://nad.ra.se). To be used in element
  function</citation>
  <descriptiveNote>
    <p>Codes for categorizing different types of
    authority records [...]</p>
  </descriptiveNote>
</localTypeDeclaration>
```

New proposal:

```
<conventionDeclaration href="https://www.iso.org/
iso-8601-date-and-time-format.html">
  <title>"ISO 8601 - Data elements and
  interchange formats - Information interchange -
  Representation of dates and times." Geneva:
  International Standards Organization,
  2000.</title>
</conventionDeclaration>
```

```
<localTypeDeclaration href="http://nad.ra.se/
static/termlistor/Kategorikoder.htm">
  <abbreviation>Categorycodes</abbreviation>
  <descriptiveNote>
    <p>The categorycodes used in Swedish NAD
    (http://nad.ra.se). To be used in element
    function</p>
    <p>Codes for categorizing different types of
    authority records [...]</p>
  </descriptiveNote>
</localTypeDeclaration>
```

Encoding examples for option 3 (2/2)

Current:

```
<mandate>
  <dateRange>
    [...]
  </dateRange>
  <citation>Minnesota. Executive Session Laws 1919
c49</citation>
  <descriptiveNote>
    <p>Board created in 1919 to receive and
    examine applications for bonuses from
    Minnesota soldiers.</p>
  </descriptiveNote>
</mandate>

<rightsDeclaration>
  <abbr>CCO</abbr>
  <citation href="https://creativecommons.org/
publicdomain/zero/1.0/">
  <descriptiveNote>
    <p>CCO 1.0 Universal (CCO 1.0)</p>
  </descriptiveNote>
</rightsDeclaration>
```

New proposal:

```
<mandate>
  <dateRange>
    [...]
  </dateRange>
  <term>Minnesota. Executive Session Laws 1919
c49</term>
  <descriptiveNote>
    <p>Board created in 1919 to receive and
    examine applications for bonuses from
    Minnesota soldiers.</p>
  </descriptiveNote>
</mandate>

<rightsDeclaration
href="https://creativecommons.org/publicdomain/zero
/1.0/">
  <abbr>CCO</abbr>

  <title>CCO 1.0 Universal (CCO 1.0)</title>
</rightsDeclaration>
```

Scope of <abbreviation> and <abbr>

- EAC-CPF uses <abbreviation>:
 - To encode abbreviation or code for identifying a thesaurus, controlled vocabulary, or other standard
 - Only within <control> and as optional and not repeatable
- EAD3 uses <abbr>:
 - In the same way as EAC-CPF within <control>, but also...
 - ... to encode the shortened form of a(ny) word or phrase
 - As optional and repeatable

Contexts for <abbreviation> and <abbr>

- EAC-CPF uses <abbreviation> in:
 - <conventionDeclaration>, <localTypeDeclaration>, <rightsDeclaration>
 - EAD uses <abbr> in:
 - <conventiondeclaration>, <localtypedecclaration>, <rightsdeclaration> and basically everywhere (see tag library for details)
- <https://www.loc.gov/ead/EAD3taglib/EAD3.html#elem-abbr>

Proposal (1/2)

- Rename <abbreviation> respectively <abbr> within <control>
 - Suggested name: <vocabularyCode>
 - Could apply to both EAS
 - Would follow the very specific scope of the element in the context <conventiondeclaration>, <localtypeddeclaration>, <rightsdeclaration>
 - Would allow for a content model following the current approach in EAC-CPF ([token] instead of [text]; no sub-elements)

Proposal (2/2)

- Rename <abbreviation> respectively <abbr> within <control> (continued)
 - Would minimise confusion in EAD3
 - Would allow EAD to continue using <abbr> in all other sections
 - Would allow EAD to rename <abbr> to <abbreviation> in the next major revision (following the principle to avoid abbreviated tag names)